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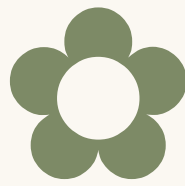
YOUR FREE PRINTABLE

UK tax year planning checklist



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T A X Y E A R C H E C K

annual checklist

Tax year ends · 5 April ____ ISA allowance: £20,000 Remaining: £____

ISA deadline · Use before 5 April: ☐ Amount to transfer: £____

Pension annual allowance · £60,000 Used: £____ Remaining: £____

Carry forward (unused pension) · Previous years unused: £____
Consider: ☐

Capital gains · Annual CGT allowance: £3,000 Gains this year: £____

Self-assessment · Filed: ☐ Deadline: 31 Jan ____ Tax paid: ☐

Pension contribution top-up · Before 5 April: £____ Tax relief benefit: £____

T H E 5 T H A P R I L D E A D L I N E C O M E S E V E R Y
Y E A R — M A K E T H E M O S T O F E V E R Y O N E

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